



# NJHMFA ENERGY BENCHMARKING TECHNICAL MANUAL

## **EXECUTIVE SUMMARY**

This technical manual provides guidelines for building managers to successfully benchmark and report their energy usage to the New Jersey Housing and Mortgage Finance Agency (HMFA). Benchmarking is necessary for HMFA to assess sustained performance and compare each building to similar building types on their sustained performance, track the overall progress of efficiency upgrades, and effectively allocate our resources to proven models. Collected benchmarking data will be used to facilitate efficient analysis of energy performance for better management of energy usage, decreased energy expenditures, identify interesting energy use trends over time, decreased carbon emissions, and comparison of energy usage among similar locations and building types. It will allow HMFA to quantitatively compare energy usage in the newer buildings vs. the older buildings and the energy usage in the HMFA buildings that have incorporated energy efficiency measures vs. the buildings that have not received energy efficiency improvements.

## **DEFINITION OF ENERGY BENCHMARKING**

Energy benchmarking is the process of analyzing energy usage over time and comparing the total use to the total cost. Because energy usage is affected by changes in temperature, benchmarking incorporates hot and cold weather data in order to determine the peak usage periods over time. The final results are generally expressed based upon square foot use. This allows for multiple buildings to be aggregated and compared. It is good measurement for evaluating building energy performance based on the type of building, occupancy, fuel source(s), location, weather, etc.

## **PURPOSE OF ENERGY BENCHMARKING**

The purpose for benchmarking the energy performance of the buildings within the HMFA portfolio is to gain a better understanding of how the buildings use their energy and whether the energy efficiency measures that have been implemented within our buildings have realized their expected energy savings. It will also help us understand how our buildings are performing compared to similar buildings in other states. This analysis also has implications that can guide how HMFA provides financing in the future by:

1. Identifying properties that could benefit from energy efficiency upgrades;
2. Providing guidance for future energy efficiency program development;
3. Providing an underwriting basis for expected utility cost reduction achieved through energy efficiency and renewable energy programs;

## GETTING STARTED

The following instructions will guide you through the process of collecting the utility data, granting HMFA access to the information, and uploading the information online through the EPA Portfolio Manager system.

### IMPORTANT NOTES:

- In order to qualify for this point, the application shall include a copy of the completed, signed and submitted letter of intent from the developer to NJHMFA.
- Prior to issuance of the 8609, developer/owner will submit a signed energy benchmarking utility release form for all common area meters (gas, oil, and electric, etc.), provision of certain project data (square footage per building, mechanical systems installed, etc.) and signed energy benchmarking utility release forms for a minimum of 75% of tenants rented up at time of 8609 issuance.
- Applicant will also be required to include the tenant utility release form as a part of the lease agreement. For the next two years, the applicant will ensure that at least 75% of tenants have viable utility release forms and will collect the utility data from the applicable utility company on a semi-annual basis.
- NJHMFA does not provide additional, set-aside funding for Green Items covered by this program.

### SUBMIT ALL REQUIRED DOCUMENTATION AFTER A TAX CREDIT ALLOCATION TO:

*Please send all required documents to:*

Kwesi Daniels  
NJ Housing and Mortgage Finance Agency  
[kdaniels@njhmfa.state.nj.us](mailto:kdaniels@njhmfa.state.nj.us)  
Phone: 609.278.7370  
Fax: 609.278.8859

For U.S. Post Office:  
P.O. Box 18550  
Trenton, NJ 08611

For Fed Ex, UPS, Visitors, etc:  
637 S. Clinton Ave.  
Trenton, NJ 08650-2085

### RESOURCES:

#### EnergyStar Portfolio Manger

<https://www.energystar.gov/istar/pmpam/>

#### Service providers that offer automated benchmarking through EnergyStar-

[http://www.energystar.gov/index.cfm?c=spp\\_res.pt\\_spps\\_automated\\_benchmarking](http://www.energystar.gov/index.cfm?c=spp_res.pt_spps_automated_benchmarking)

#### Energy Auditors that offer benchmarking services through NJ Clean Energy:

[http://www.njcleanenergy.com/commercial-industrial/programs/nj-smartstart-buildings/tools-and-resources/tradeally/approved\\_vendorsearch/&start=](http://www.njcleanenergy.com/commercial-industrial/programs/nj-smartstart-buildings/tools-and-resources/tradeally/approved_vendorsearch/&start=)

#### Online Portfolio Manager Training-

[http://www.energystar.gov/ia/business/benchmarking\\_training/benchmarking.html](http://www.energystar.gov/ia/business/benchmarking_training/benchmarking.html)

#### Online Benchmarking Training

[http://www.energystar.gov/index.cfm?c=business.bus\\_internet\\_presentations](http://www.energystar.gov/index.cfm?c=business.bus_internet_presentations)

#### Pre-Recorded Energy Benchmarking Training-

<https://energystar.webex.com/mw03071/mywebex/default.do?siteurl=energystar>

## PROCEDURES

Use the following checklist as a guide as you benchmark the building and tenant utility usage.

- **STEP 1:** Sign and submit Letter of Intent to HMFA
- **STEP 2:** Gather building and space attribute information using the **HMFA ENERGY BENCHMARKING SURVEY FORM**.
- **STEP 3:** **COMPLETE AND SIGN** the **BUILDING OWNER UTILITY RELEASE FORM**
- **STEP 4:** Collect **12 CONSECUTIVE MONTHS** of **BUILDING UTILITY BILLS** and input the account details into the **HMFA UTILITY SPREADSHEET (SEE APPENDIX A)**
- **STEP 5:** Upload **BUILDING** utility data into **PORTFOLIO MANAGER**
- **STEP 6:** Have the tenants **COMPLETE AND SIGN** the **TENANT UTILITY RELEASE FORM**

**NOTE: If the accounts are PSE&G, ensure the 10 digit account number(s) is listed and legible (it should start with a “6”).**

- **STEP 7:** Collect **12 CONSECUTIVE MONTHS** of **TENANT UTILITY BILLS** and input the account details into the **HMFA UTILITY SPREADSHEET (SEE APPENDIX A)**
- **STEP 8:** Create a building profile in **PORTFOLIO MANAGER (SEE APPENDIX B)**
  - Portfolio Manager Username: \_\_\_\_\_
  - Portfolio Manager password: \_\_\_\_\_
- **STEP 9:** Upload building and tenant utility data into **PORTFOLIO MANAGER**
- **STEP 10:** Authorize annual reporting to **HMFA THROUGH PORTFOLIO MANAGER**
- **STEP 11:** Submit the following items to HMFA
  - **HMFA Benchmarking survey form**
  - **Tenant and Building utility release forms (75% of tenants)**
  - **12 consecutive months of utility bills for each building and tenant utility account**
  - **Filled out HMFA Utility Spreadsheet (SEE APPENDIX A)**

## **LETTER OF INTENT – ENERGY BENCHMARKING INITIATIVE**

*Please e-mail a signed copy of this page to NJHFMA Green Homes Office and include in Tax Credit Application.*

By signing this document, I certify the following (“we” refers to the applicant organization):

1. **We have received and reviewed the Program’s materials, consisting of the ‘LIHTC Green Point Requirements 2012’ and ‘Energy Benchmarking’ documents, which includes the letter of intent, building utility release form and survey, and tenant utility release form.**
2. **We understand that a meeting with the NJHMFA Green Homes Office and Green Technical Advisor is required within three (3) months of the Tax Credit Award Date.**
3. We understand that prior to issuance of the 8609 we will submit a signed energy benchmarking utility release form for all common area meters (gas, oil, and electric, etc.), provision of certain project data (square footage per building, mechanical systems installed, etc.) and signed energy benchmarking utility release forms for a minimum of 75% of tenants rented up at time of 8609 issuance.
4. We understand for the next two years, we will ensure that at least 75% of tenants have viable utility release forms and will collect the utility data from the applicable utility company on a semi-annual basis.
5. **We understand that NJ *ENERGYEFFICIENT* Homes certification is a prerequisite to participation in the LIHTC Green Point program. I will comply with the ENERGY STAR requirements as indicated in the LIHTC QAP section (c)8 and 2012 ENERGY STAR Equivalency letter of intent.**
6. **If requested we will allow NJHMFA staff access to the project site pre, during and post construction for the purpose of but not limited to: project monitoring, performance testing, interviews, surveys and photographs.**
7. **I am an authorized representative of the organization.**

**Signature:**

\_\_\_\_\_ **Date:** \_\_\_\_\_

**Name of signer:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Project Name:** \_\_\_\_\_

**Organization:** \_\_\_\_\_

## **Energy Benchmarking Survey Form**

*Please complete one Building Data Form for each building in a development.*

### **BUILDING DATA**

**Development Name:** \_\_\_\_\_ **NJHMFA #:** \_\_\_\_\_

**Address:** \_\_\_\_\_ **Year Built:** \_\_\_\_\_

**Building type (Senior, Family, Mixed):** \_\_\_\_\_

**Electricity Metering (check one):** ☐ Individually-Metered / ☐ Master-Metered

**Gas Metering (check one):** ☐ Individually-Metered / ☐ Master-Metered

**Percent of floor area that is cooled in 10% increments (10%, 20%, 30%, etc.):** \_\_\_\_\_

**Percent of floor area that is heated in 10% increments (10%, 20%, 30%, etc.):** \_\_\_\_\_

**Total Sq. Ft.:** \_\_\_\_\_ **Common Area Sq. Ft.:** \_\_\_\_\_ **# of Buildings:** \_\_\_\_\_

**# of Elevators:** \_\_\_\_\_ **# of Floors in each building:** \_\_\_\_\_ **# of units:** \_\_\_\_\_

**# of Bedrooms:**      **1:** \_\_\_\_\_ **2:** \_\_\_\_\_ **3:** \_\_\_\_\_ **4:** \_\_\_\_\_

**Primary hot water fuel type:** \_\_\_\_\_

**Past Energy-Efficiency Work Completed (select all that apply and include year implemented):**

<b><u>Energy-Efficiency Improvement</u></b>	<b><u>Year implemented</u></b>
<input type="checkbox"/> ENERGY STAR Homes Certification (not equivalency)	
<input type="checkbox"/> ENERGY STAR Equivalency	
<input type="checkbox"/> Solar Photovoltaic (PV)	
<input type="checkbox"/> Green Future or Affordable Green	
<input type="checkbox"/> Cogeneration (CHP)	
<input type="checkbox"/> Solar Hot Water	
<input type="checkbox"/> Windows	
<input type="checkbox"/> Lighting	
<input type="checkbox"/> Other (please describe)	

*Please include all types of energy used. Complete additional forms as needed when utility information differs by building.*

### **METER INFORMATION**

**Electric Utility Name:** \_\_\_\_\_

**Account Number(s):** \_\_\_\_\_

**Natural Gas Utility Name:** \_\_\_\_\_

**Account Number(s):** \_\_\_\_\_

**Fuel Oil Utility Name:** \_\_\_\_\_

**Account Number(s):** \_\_\_\_\_

**Other Meters-not including water or sewer (e.g. Renewable Energy, Propane, Cogeneration):**

**Utility Name & Account Number(s):**

\_\_\_\_\_

Utility Name & Account Number(s):

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Utility Name & Account Number(s):

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**BUILDING SYSTEM CHARACTERISTICS:**

**Please check all that apply:**

**Heating System Type:**

- ☐ Furnace
- ☐ High Efficiency Condensing Furnace
- ☐ High Efficiency Condensing Burner
- ☐ Hot Water Boiler
- ☐ Steam Boiler
- ☐ Heat Pump
- ☐ High Efficiency Variable Heat Pump
- ☐ Ground Source Heat Pump
- ☐ Packaged Terminal Air Conditioner (PTAC) Unit
- ☐ Cogeneration (CHP)
- ☐ Special Description:

**Cooling System Type:**

- ☐ Chiller
- ☐ Wall Unit (in each Apt.)
- ☐ Cooling Tower
- ☐ Window Unit (in each Apt.)
- ☐ Compressor (mini-split)
- ☐ Compressor (ducted)
- ☐ Ground Source Heat Pump
- ☐ Packaged Terminal Air Conditioner (PTAC) Unit
- ☐ Special Description:

**Building type:**

- ☐ Wood or steel frame
- ☐ Solid Concrete
- ☐ Masonry
- ☐ Modular
- ☐ Structurally insulated panels (SIPS)
- ☐ Other type:

**Optional:**

- ☐ Wood or steel frame
- ☐ Solid Concrete
- ☐ Masonry
- ☐ Modular
- ☐ Structurally insulated panels (SIPS)
- ☐ Other type:

## **Building Owner Utility Release Form**

### ***Authorization for NJHMFA to Receive Customer Utility Data***

**\*\*\*Please attach one year of utility data bills to this form\*\*\***

Date: \_\_\_\_\_

To Whom It May Concern:

By signing this release form, the property owner (Owner) grants the New Jersey Housing and Mortgage Finance Agency (NJHMFA) and its designee, a consultant for this initiative, permission to access utility data information for the past two (2) years of and for the following four (4) years from this date for the development/building referenced below. The utility data includes energy consumption, energy demand, energy cost, as well as associated fees and taxes for each billing period. This information will be used to track energy efficiency and consumption of the building indicated below for the express purpose of measuring the success of past energy upgrades, comparing building performance to similar building types and determining need for future energy efficiency improvements.

I am an authorized representative for the development and building listed below and account(s) listed on the following page(s), totaling \_\_\_\_ pages, and represent and warrant that I have full authority to execute this release form on behalf of the Owner. Owner understands that the information obtained as part of this initiative may be released by the NJHMFA to other participating developments upon request for comparison purposes. Comparison reports compiled by the NJHMFA for this program and provided to other developments will not include this development's name or address. Owner understands and acknowledges that such information may be subject to release under the Open Public Records Act, N.J.S.A. 47:1A-1 et seq., or other applicable law. Owner understands that each applicable utility provider (Utility) reserves the right to verify this authorization request.

Owner authorizes the Utility to release the requested information on Owner's account or facilities to the NJHMFA or its designee. Owner hereby releases, holds harmless, and indemnifies the NJHMFA and the Utility from any liability, claims, demands, causes of action, damages, or expenses as a result of, but not limited to: 1) any release of information to NJHMFA or its designee pursuant to this Utility Release; or 2) the unauthorized use of this information by NJHMFA or its designee.

Sincerely,

Authorized Representative (signature)

***Please print clearly.***

Authorized Representative Name: \_\_\_\_\_

Development Name: \_\_\_\_\_

Building Service Address: \_\_\_\_\_

Development Contact: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_



## **Tenant Utility Release Form**

### ***Authorization for NJHMFA to Receive Customer Utility Data***

**\*\*\*Please attach one year of utility data bills to this form\*\*\***

Date: \_\_\_\_\_

To Whom It May Concern:

By signing this release form, the tenant (Tenant) grants the New Jersey Housing and Mortgage Finance Agency (NJHMFA) and its designee (a consultant for this initiative) permission to access utility data information for the past two (2) years of and for the following four (4) years from this date for the unit referenced below. Utility data includes energy consumption, energy demand, energy cost as well as associated fees and taxes for each billing period. This information will be used to track energy efficiency and consumption of the building indicated below for the express purpose of measuring the success of past energy upgrades, comparing building performance to similar building types and determining need for future energy efficiency improvements.

I am an authorized representative for the unit and account(s) listed below and represent and warrant that I have authority to execute this release. Tenant understands that the information obtained as part of this initiative may be released by the NJHMFA to other participating developments upon request for comparison purposes. Comparison reports compiled by the NJHMFA for this program and provided to other developments will not include tenant's information or this development's name or address. Tenant understands and acknowledges that such information may be subject to release under the Open Public Records Act, N.J.S.A. 47:1A-1 et seq., or other applicable law. Tenant understands that each applicable utility provider reserves the right to verify this authorization request.

Tenant authorizes the Utility to release the requested information on Tenant's account to the NJHMFA or its designee. Tenant hereby releases, holds harmless, and indemnifies the NJHMFA and Utility from any liability, claims, demands, causes of action, damages, or expenses as a result of, but not limited to: 1) any release of information to NJHMFA or its designee pursuant to this Utility Release; or 2) the unauthorized use of this information by NJHMFA or its designee. Tenant understands that he/she may cancel this authorization at any time by submitting a written request to both the Utility and NJHMFA.

Sincerely,

Authorized Representative (Tenant signature) \_\_\_\_\_

***Please print clearly.***

Representative name: \_\_\_\_\_

Development Name: \_\_\_\_\_

Building Address: \_\_\_\_\_

Unit Number: \_\_\_\_\_ Number of Bedrooms in Unit: \_\_\_\_\_

***Please list utility provider(s) and account number(s):***

ELECTRIC UTILITY: \_\_\_\_\_ ACCOUNT #: \_\_\_\_\_

GAS UTILITY: \_\_\_\_\_ ACCOUNT #: \_\_\_\_\_

## APPENDIX A

Contact Kwesi Daniels at [Kdaniels@njhmfa.state.nj.us](mailto:Kdaniels@njhmfa.state.nj.us) for the electronic version of the spreadsheet.

### Definitions:

1. **Fuel Type:** Gas or Electric
2. **Utility Company:** PSE&G, Atlantic City Electric, JCP&L, etc.
3. **Common Area:** All bills paid only by the building management
4. **Tenant:** All bills paid only by the tenants
5. **Usage Type:** Baseload (BL) - fuel used for basic energy items like lighting and cooking  
Cooling (C)  
Heating (H)  
Domestic Hot Water (DHW)

HMFA #	Property Name	Unit	Fuel Type	Usage Type	Utility Company
		Common Area			
		Common Area			
		Tenant			
		Tenant			
Project Gross (sqft)	Conditioned Area (sqft)	Common Area (sqft)	__ bedroom (sq ft) - __ units	__ bedroom (sq ft) - __ units	__ bedroom (sq ft) - __ units
Number of buildings	Number of floors per building	Number of units	__ bedroom building locations (amount)	__ bedroom building locations (amount)	__ bedroom building locations (amount)
Oil Company	Account #				
Electric			Gas		
Unit #	Account #	signed release form for this account (Y/N)	Unit #	Account #	signed release form for this account (Y/N)



# PORTFOLIO MANAGER ■ QUICK REFERENCE GUIDE

## MULTIFAMILY HOUSING

### Tracking Your Energy Performance

Portfolio Manager is an online, interactive energy management tool that allows you to measure and track your building's energy and water consumption, identify investment priorities, and verify improvements over time. Multifamily housing communities can use Portfolio Manager to track weather-normalized energy use intensity (EUI), energy costs, greenhouse gas emissions, and water consumption.

### USE PORTFOLIO MANAGER STEP-BY-STEP

STEP	ACTIVITY	ACTION
1	Access Portfolio Manager	<a href="http://www.energystar.gov/benchmark">www.energystar.gov/benchmark</a>
2	Access your account <ul style="list-style-type: none"> <li>Create a new account</li> <li>Login to an existing account</li> </ul>	<ul style="list-style-type: none"> <li>Click REGISTER.</li> <li>Enter user name and password and click LOGIN.</li> </ul>
3	Review system updates and enter your account	Click ACCESS MY PORTFOLIO.
4	Add a new facility	Click ADD a Property.
5	Select property type and enter general facility information	<p>From the "Add a Property" screen, most users will select "A single facility for which my organization owns or manages 90% or more of the floor area." This is the case even for garden or townhouse properties with multiple buildings. Only select the last option ("A campus or other collection of multiple facilities at the same geographic location") if you have multiple multifamily buildings, all on the same master meter. Click CONTINUE, enter General Facility Information, and then click SAVE.</p>
6	Enter space use data	<p>Go to "Space Use" section and click ADD SPACE.</p> <ul style="list-style-type: none"> <li>Enter a facility name. In the "Select a Space Type" menu, select "Multifamily Housing." Enter an effective date. Click CONTINUE.</li> <li>Enter space data. Enter total gross square footage (including both common area and apartment space) even if you are only entering common area energy data. The other space use questions are voluntary, but it is highly encouraged to enter optional space use information. Click SAVE.</li> </ul>
7	Enter energy use data	<p>Go to "Energy Meters" section and click ADD METER.</p> <ul style="list-style-type: none"> <li>Enter meter name, type, and units. Click SAVE.</li> <li>Enter number of months and start date. Click CONTINUE.</li> <li>Enter energy use and cost. Click SAVE.</li> </ul> <p>Repeat for all energy meters and fuel types.</p>
8	Set metering configuration	<p>Underneath the "Energy Meters" section, click SET METERING CONFIGURATION.</p> <ul style="list-style-type: none"> <li>Select appropriate option from radio button list. Click SAVE.</li> <li>See Features section for additional guidance.</li> </ul>
9	Review and interpret results	Go to "Facility Performance" section and review your results. More information is provided on pages two and three of this guide.
10	Manage account	Share data and perform other administrative tasks.

